



Strategic Plan Fiscal Years 2018-2022

Approved by the COA Board: June 19, 2018

Summary: This document contains strategic direction, background information, significant trends, and internally identified Goals supported by an Action Plan. A glossary aids the reader in understanding unfamiliar terms and organizations. Exhibits supporting conclusions can be found in the Appendices. While maintaining flexibility to work as circumstances dictate or opportunities arise, the COA Department and Board present this strategic plan with suggested improvement actions and annual focus areas to prioritize future direction:

- FY '17 Community/Senior Center Feasibility Study
- FY '18 Transportation; Continuation of Community/Senior Center Project
- FY '19 Senior Tax Relief; Housing Options; Web-based program, payment, registration service; Community/Senior Center

FY '15 Created by COA Long Range Planning Subcommittee: Liz Bishop; Mary Daigle; Verna Gilbert; David Klein, COA Director; Melinda Lindquist; Abha Singhal, COA Board Chair 2014; Liz Thibeault, Subcommittee Chair; Jace Tilton, Friends of the Carlisle COA

FY '17 Updated by: Donna MacMullan, COA Board Chairperson; Abha Singhal, COA Board Vice-Chair; Maxine Crowther, COA Board; Peggy Hilton, COA Board; David Klein, COA Director; Angela Smith, COA Program/Outreach Mgr.

FY '18 Updated by: Donna MacMullan, COA Board Chairperson; Abha Singhal, COA Board; Maxine Crowther, COA Board; Bob Luoma, COA Board; David Klein, COA Director; Angela Smith, COA Program/Outreach Mgr.

Carlisle Council on Aging

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Section 1: Strategic Direction

The Carlisle Council on Aging (COA) Department is a support center for the seniors and mobility-challenged persons in town. Capable management and an experienced, enthusiastic staff position the COA for operational effectiveness to maintain or improve the quality of life for Carlisle's age 60+ residents, "seniors" as defined by the Massachusetts Executive Office of Elder Affairs. This long range plan articulates a strategic vision with measurable actions to achieve the COA's Goals:

- Trust: Ensuring prudent management of the COA
- Independence: Supporting mobility and access for Carlisle's adult citizens
- Connection: Providing opportunities for positive interactions supporting emotional, cognitive, and physical well-being of Carlisle seniors
- Security: Aiding safety and stability for Carlisle seniors

Developed by a COA Board subcommittee, in conjunction with the COA Director and Program Manager, the plan is a "living" document to prioritize objectives, measure progress, and achieve the COA mission. Factors identified by respondents of the 2009 Town Survey Question #3 (66% of respondents were age 50+) as important, are:

- Tax relief
- Housing alternatives
- Access to transportation
- Aging in place/livable community ("Healthy Aging in Place")

Many of Carlisle's age 60+ residents want to remain in Carlisle. To that end, COA services and programs must continue to support accessible and safe independent living in one's home. Other components of independent living are access to information, especially on-line, and access to programs and services that support cognitive, emotional, and physical well-being. Mobility is also essential, whether within one's home or transportation to support and augment basic needs, such as food shopping and medical appointments. Future considerations include recommendations from the 2015 Transportation Pilot Program for mobility-challenged persons as well as advocacy for additional senior tax relief.

A livable community is a connected place. Due to the town's rural nature, Carlisle's age 60+ residents can feel isolated and alone. Stimulation through social programs and services provide participants with an improved sense of security and community. Referrals for local, state, and federal financial support services offer eligible residents alternatives for improving financial stability through such options as the Senior Tax Worker Program, SHINE counseling, and food and fuel assistance. Potential future tax relief programs would benefit qualified, long-term residents.

A key factor in planning for the future priorities that the COA and Carlisle will face is the very large population of Baby Boomers (a segment of over 70 million nationally, born between 1946 and 1964). As of December 2016, this population ranges between 52 and 70 years of age. It is anticipated that within ten years this population segment will represent 45% of the town. (Source: Town Clerk, February, 2017) and will cause a steep increase in demand for COA services. Carlisle must prepare for this increased demand by addressing the needs of Baby Boomers, while evaluating and maintaining its programs and services to older residents.

Retention of Carlisle's age 60+ residents strengthens the town's fiscal foundation. Notably, with roughly 27% of the population born before 1957 and typically not enrolling children in public schools, these residents' taxes

play a key role in funding the educational needs of the town, while not incurring additional educational costs. However, many residents find the lack of housing alternatives a limiting factor to remaining in town. Existing housing stock offers relatively few smaller/attached, easily-maintained, and/or affordable residences, thereby fueling a trend of Carlisle seniors needing to leave town to find these more livable residence choices. All townspeople, as well as the COA, will need to advocate for more housing alternatives to retain this necessary group of tax payers. In 2018, the Board approved a strategic focus on Healthy Aging in Place, including aspects of socialization, property tax relief, and affordable housing.

The COA will continue to work, through marketing and communication efforts, to strengthen the department's identity in order to attract Baby Boomers to its programs and solicit input on additional programs to address their needs. The COA is working to integrate age 50-59 residents in volunteer efforts to ensure a strong COA, poised for the future. With a greater understanding of the impact of this emerging population, the COA is advocating for a community/senior center for additional program and department space.

To enhance understanding of unfamiliar terms, please refer to the Glossary.

Section 2: Background

Town of Carlisle

Carlisle is a small, rural town about 20 miles northwest of Boston, with a gross population of 5235 (Source: Town Clerk February, 2017). Town government is comprised of elected officials and volunteers. The Board of Selectman, the Finance Committee, and a Town Administrator steer town government, budgeting, and spending, subject to Town Meeting approval. Residents of this highly educated, aging, affluent town share these values:

- learning/education
- open space
- strong community connection
- volunteering
- physical well-being

Respondents to the Town Survey of 2009 identified three priorities that affect Carlisle's quality of life:

- tax relief (*Exhibit I*)
- varied housing options (*Exhibits II a and II b*)
- access to a variety of transportation services (*Exhibit III*)

Significant Trends

Several trends impact the Town of Carlisle:

- The Graying of Carlisle (*Exhibit IV a*): In 2011, Carlisle's age 60+ cohort was roughly 20% of the population; in 2014, roughly 24%, in 2016, roughly 27.5%. This outpaces today's national trend and exceeds the national prediction for 2030. "Around 40 million people are currently over 65, some 13% of the total population, with that number also predicted to double by 2030, accounting for nearly 20% of the population." (Source: National Institute on Aging (NIA), Older Americans, 2012, available at www.agingstats.gov) Today the 50+ town population represents 46%. (Source: Town Clerk, February, 2017).
- Maturing of Baby Boomers with Unique Viewpoints and Needs (*Exhibit IV b*): Over 70 million Americans born between 1946 and 1964 are known as Baby Boomers. Generally, they expect to work longer and retire later than their parents did. As of end of 2016 Baby Boomers (1843 residents) are 36% of the total Carlisle population and have unique needs that must be addressed now and in the future. "Some 82% of workers age 50 and older say it is at least 'somewhat likely' they will work for pay when of retirement age; 11% plan to never retire." (Source: October 2014 Associated Press-NORC Center for Public Affairs Research at the University of Chicago)
- Monitoring pilot transportation service: In 2015 a transportation program was launched with an outside company to provide service to mobility-challenged persons. The pilot program needs to be assessed before the end of the second year of the pilot.

Council on Aging

Why: Department Mission, Target Audience

The mission of the Council on Aging is to provide advocacy and support services to help Carlisle seniors live dignified and independent lives. The COA strives to continually improve the quality of life for Carlisle citizens

60 years and older, by identifying their needs and matching available public and private resources to address those needs. The COA is dedicated to compassion, outreach, and advocacy.

The primary audience is Carlisle's age 60+ residents. Carlisle, following the guideline of the Massachusetts Executive Office of Elder Affairs, counts people age 60 and over as seniors. This group is outpacing the general Carlisle population growth rate and, in 2016, is 27.5 % of the population or roughly 1409. (Source: Town Clerk, February, 2017) The audience can be further broken into adjusted population decade segments:

- 50-59 years of age (18.4%) (emerging Baby Boomers)
- 60-69 years of age (17.6%) (maturing Baby Boomers)
- 70-79 years of age (6.5%)
- 80-89 years of age (3.0%)
- 90+ years of age (0.5%)

Additional audiences are caregivers needing support and referrals and citizens in town needing food and/or fuel assistance, other financial support, or social worker services, and the mobility-challenged.

Who: Department, Board, Volunteers, Partners

In order to advance the quality of life for older adults and mobility-challenged persons, the COA Department plans and implements programs and services to address their needs and coordinates with the Massachusetts Executive Office of Elder Affairs. As of December, 2016, the department is comprised of five office employees on site at Town Hall: a full-time director, a full-time outreach coordinator/program manager, a part-time transportation coordinator and two part-time administrative assistants. The Town of Carlisle contracts with a licensed social worker for up to eight hours a week. Several part-time van drivers are employees in the field. The COA office is located at Town Hall, enabling collaboration with other town entities. Office hours are posted as well as communicated through the town's website and a monthly newsletter.

The COA Board has nine voting members, appointed by the Board of Selectmen, and several non-voting members (associates). The board meets monthly to provide policy direction, advice, and support for the work of the COA Department. Various subcommittees advance the work of the board and benefit the COA Department.

More than 150 people per year lend their time to help out with COA services, programs, and events. Many also help other departments, both as volunteers and as part of the Senior Tax Worker program. COA volunteers saved the town money by working close to 4,500 service hours in 2016. (Source: My Senior Center (MSC) database)

The COA partners with many town departments and elected officials, community groups and state and regional entities to further the mission of the COA:

- Town of Carlisle - Board of Selectmen, Finance Committee, Town Manager, Treasurer, Town Clerk, Accountant, Housing Authority, Board of Health, Planning Board, Recreation Commission, Building Inspector, Board of Assessors, Carlisle Fire Department, Carlisle Police Department, Gleason Public Library, Carlisle Public School District, Concord-Carlisle High School.
- Community Groups – Friends of the Carlisle Council on Aging, Friends of the Gleason Public Library, Carlisle Garden Club, Carlisle Churches, Concord-Carlisle Community Chest, Girl Scouts, Boy Scouts, National Charity League.
- State Groups - Massachusetts Executive Office of Elder Affairs, Massachusetts Council On Aging.

- Regional Groups - Community Health Network Area, Lowell Regional Transit Authority, Minuteman Senior Services, Regional Transportation Coordinating Council.

What: Services and Programs

The COA offers a broad array of services and programs. Key services include transportation, outreach, fuel and food assistance, and loans of durable medical equipment. During 2016, the Outreach Coordinator made more than 6,635 client contacts (up from 4123 in 2013), an average of 574 a month (up from 344 in 2013). During 2016 there were 2,490 rides (up from 1,759 in 2013) to more than 261 (up from 134 in 2013) unique (unduplicated) residents. This represents 18.5% of the target audience (up from 10% in 2013). Volunteer drivers provided about 5% of these rides. Typical rides consisted of travel to medical appointments, shopping, events, and COA-sponsored day trips. Programs include social events, health clinics and lectures, exercise classes, nutrition events, and cultural activities. In 2016, programs and services reached about 650 (up from 520 in 2013) unique (unduplicated) seniors or just over 46% of the target audience (up from 39% in 2013). (Source: MSC database)

Where: Program and Office Venues

The COA department schedules programs and services across multiple venues. Within Carlisle, venues include: Town Hall, Carlisle Churches, Gleason Public Library, Carlisle Public School, Ferns Country Store, Carlisle Village Court Sleeper Room, and Benfield Farms. Beyond Carlisle, the COA utilizes the Concord-Carlisle High School, Minuteman High School, and Nashoba Valley Technical High School.

The COA department office space is located at the Town Hall and offers regular weekday office hours.

How: Funding, Technology, Communication

The COA is supported through an appropriated town budget and a combination of grants, including one from the Friends of the Carlisle Council on Aging, a 501c (3) non-profit organization differentiated from the COA Board. The Concord-Carlisle Community Chest provides grant support as does the Massachusetts Executive Office of Elder Affairs through its State Formula Grant program. The Carlisle COA receives funding through the town's affiliation with the Lowell Regional Transit Authority. (*Exhibit V*)

The COA populates the MSC database to track monthly and annual program utilization and analyze participation statistics to evaluate the reach and relevancy of programs and services.

The COA uses various media to reach its audience(s). Communication vehicles include outreach and response via telephone; a monthly newsletter, *The Carlisle Connection*; weekly Bits & Bytes email reminder, bi-weekly email News You Can Use, and special alerts, as needed; publicity and announcements in the town newspaper, *Carlisle Mosquito*; a monthly local cable access television program, *Carlisle Community Forum*; and social media, currently via Facebook.

Section 3: Action Plan

Purposeful actions with defined owners and time frames support the objectives to ensure progress toward realization of each Goal.

Goal I - Trust: Ensuring Prudent Management and Open Communication

Objective A - The COA Director will ensure efficient operation of the organization.

In support of Objective A, the Director, staff, and the Board will perform the following operational activities:

Director:

1. Direct COA staff, encourage training and development, and provide feedback on an ongoing basis.
2. Hold staff meetings regularly to discuss concerns and opportunities.
3. Communicate with the COA staff, the Town Administrator, and other Carlisle town departments through staff meetings, one-to-one conversations, phone calls, and emails. Act as liaison to the Carlisle community by participating on town committees to assist staff and advocate for Carlisle seniors.

COA Staff:

1. Monitor and assess volunteer needs. Train and recruit volunteers. Acknowledge the good work of volunteers.
2. Protect confidential client information.

Financial:

1. Prepare annual budget for review by the COA Board, the Carlisle Finance Committee, Town Administrator, and the Board of Selectmen. Prepare and submit incoming receipts and outgoing expenditures to the Town Accountant.
2. Provide advice to and oversight of the COA budget process.
3. Prepare and submit financial reports.
4. Review monthly financial reports. Investigate, plan, and apply for annual or ad hoc grants including but not limited to the Friends of the COA grant, the State Formula grant, and the Concord-Carlisle Community Chest grant.

Planning:

1. Forecast facility needs to the COA Board, the Town Administrator, the Board of Selectmen, and other appropriate boards and committees.
2. Monitor staffing needs and advocate for increased hours as demands grows.
3. Update Long Range Plan.

Reporting:

1. Comply with applicable federal and state laws and regulations as well as Carlisle town by-laws and keep up-to-date with changes through attendance at Department Head meetings as well as periodic workshops, trainings, and meetings sponsored by the Massachusetts Executive Office of Elder Affairs, the Massachusetts Council on Aging, and other relevant organizations.
2. Prepare, submit, and review operations reports for the COA Board.
3. Track COA-sponsored programs and services by utilizing MSC software, the COA database, as well as other office technology tools.
4. Prepare and submit annual report to the Massachusetts Executive Office of Elder Affairs.

5. Prepare article highlighting COA programs and services for Carlisle's Annual Report; include feedback from the COA Board.

Actions

#	Description	Responsible	Due
1	Strategic Plan to Reflect FY '18 - FY '22	SP Subcommittee, COA Staff	June FY '18

Objective B - The COA will instill confidence through interactions with the community.

In support of Objective B, the Director and staff will perform the following operational activities:

1. Produce a monthly TV show called 'Carlisle Community Forum.' Invite guests and other town departments to participate in the forum.
2. Attend the luncheons, breakfasts, coffees as schedule permits.
3. Participate in town-held events such as Old Home Day, as time/resources permit.
4. Provide a caring environment for anyone who walks into the COA office
5. Provide timely and efficient replies to inquiries.
6. Submit a list of selected COA activities to the local newspaper.

Actions

#	Description	Responsible	Due

Goal II - Independence: Supporting mobility and access to transportation for Carlisle seniors & mobility-challenged persons

Objective A: The COA will strive to optimize transportation needs for scheduled service during business hours.

In support of Objective A, the Director and staff will perform the following operational activities:

1. Monitor transportation services for trends with respect to defined regular service, out-of scope service (hours/days), and ADA-compliant vehicle needs.
1. Monitor usage of all COA vehicles with respect to optimizing utilization.
2. Monitor drivers and their training requirements.
3. Prepare a report of transportation activities and review with the Board.

Actions

#	Description	Responsible	Due
1	Analyze data and recommend modifications as needed to Board	COA Staff, Transportation Coordinator	Data reported monthly; analysis at least annually, starting in FY '18

Objective B: In 2016, COA initiated a transport pilot program for mobility-challenged persons and senior residents in town. This is run by an independent transportation company using a vehicle owned by the COA. The program provides additional transportation options.

In support of Objective B, the Director and staff will perform the following operational activities:

1. Meet with the Transportation Task force and the program provider to review the pilot program.
2. Assess the pilot program to determine if the needs of seniors and mobility-challenged persons are being met.

Actions

#	Description	Responsible	Due
1	Analyze results and feedback from pilot program to determine next steps	COA Staff, Transportation Task Force	FY '18

Objective C: COA will continue to explore transportation alternatives focused on better service to mobility-challenged and senior town residents.

In support of Objective C, the Director and staff will perform the following operational activities:

1. Search for alternate providers.

Actions

#	Description	Responsible	Due
1	Assess the degree of success of the area roll-out of the Cross Town Connect consortium and evaluate the potential benefits, financial impact, and tradeoffs for Carlisle to join and report to Town Administrator and Board of Selectmen	COA Staff, Transportation Committee	FY '19
2	Re-assess transportation alternatives	COA Staff, Transportation Committee	Annually starting in FY '18

Goal III - Connection: Providing opportunities for positive interaction supporting emotional, cognitive, and physical well-being of Carlisle seniors

Objective A: The COA will promote connections among seniors, mobility-challenged persons, and other residents to lessen isolation.

In support of Objective A, the Director and staff will perform the following operational activities:

1. Promote, schedule, and staff resources for congregate meals held at multiple venues.
2. Team with volunteers, Gleason Public Library, Recreation Commission, and other town resources to develop programs (e.g. Computer Literacy, Community Conversations), including intergenerational programs.
3. Staff and manage Friendly Visitor/Friendly Caller Programs to alleviate isolation.
4. Staff and manage the Meals on Wheels program.
5. Recruit volunteers to host monthly coffees.
6. Recruit volunteers to set up, serve food, and clean up after the luncheons. Order the food and arrange pickup.

Actions

#	Description	Responsible	Due
1	Investigate ways to maximize participation as facilities & circumstances allow	Program Committee, COA Staff	Annually starting in FY '18

Objective B: The COA will maintain and expand the volunteer corps.

In support of Objective B, the Director and staff will perform the following operational activities:

1. Recruit and sustain current and new volunteer force.
2. Manage annual Volunteer Appreciation event.
3. Train volunteers as required and ensure that all necessary paperwork is complete.

Actions

#	Description	Responsible	Due
1.	Recruit one or more new COA Associate Board member(s)	Nominating committee	Annually

Objective C: The COA will explore opportunities for shared and dedicated program space to foster a sense of community.

In support of Objective C, the Director and staff will perform the following operational activities:

1. Utilize shared program venues within Carlisle and beyond.
2. Gain community support for a shared community/senior center.
3. Participate in open space and recreational long range planning when needed.

Actions

#	Description	Responsible	Due
1	Define the parameters and create a gift account to receive private donations toward a capital fund for a community/senior center	COA Staff	FY '18

2	Consider alternative ways to achieve a community/senior center feasibility study	COA Staff, COA Board Chair, Space Committee	FY '18
3	Implementation of feasibility study for the community/senior center	Space Committee, COA Board	FY '19

Objective D: The COA will monitor, assess, promote, and report on programs and services provided to its target audience.

In support of Objective D, the Director and staff will perform the following operational activities:

1. Utilize communication vehicles such as newsletters, email, website, and CCTV to inform target audience of monthly programs and alert them to time-sensitive issues on Medicare, scams, etc.
2. Track current unique (unduplicated) participants utilizing MSC data base and strive to involve more age 60+ residents as participants/clients and users.
3. Utilize communication vehicles, publicity, and branding strategies to ensure the best possible participation rate.

Actions

#	Description	Responsible	Due
1	Assess participation rates in various program categories to ensure optimal services are provided.	Program Committee, Program Manager, COA Board	Data reporting monthly; assessment at least annually starting in FY '18

Objective E: The COA will establish & maintain a website.

In support of Objective E, the Director and staff will perform the following operational activities:

1. Maintain a website presence with timely posting of relevant material.

Actions

#	Description	Responsible	Due
1	Implement new website	Director, COA Staff	FY '19

Objective F: The COA will participate in and promote intergenerational activities.

In support of Objective F, the Director and staff will perform the following operational activities:

1. Team with the Recreation Department and others as needed to support ongoing intergenerational exercise programs e.g. Tap.
2. Team with schools to support ongoing intergenerational cultural programs e.g. Poetry.
3. Team with Recreation Commission to support summer programs with seniors and students e.g. Arabian Horses, Audubon.
4. Support Spring Fling.

Actions

#	Description	Responsible	Due
1	Define and promote at least one major intergenerational event e.g. Road Race	Board, COA Staff	Annually

Objective G: The COA will monitor and provide opportunities for social and learning engagement to serve its target audience(s).

In support of Objective G, the Director and staff will perform the following operational activities:

1. Independently or collaboratively manage and support programs such as cultural programs/life-long learning, aging-in-place, exercise programs, social programs, and intergenerational programs.

Actions

#	Description	Responsible	Due
1	Assess web-based service that provides the capability for self-serve program payment and registration	COA Staff, Town Treasurer	FY '19

Objective H: The COA will assess and strive to refer appropriate support to serve Carlisle seniors who experience loneliness, loss, abuse, and/or limited mobility.

In support of Objective H, the Director and staff will perform the following operational activities:

1. Provide and coordinate services such as Social Worker, Friendly Visitors, Friendly Callers, and Meals on Wheels.
2. Promote, maintain, and utilize the Carlisle COA Elder Resource Guide to facilitate referrals.
3. Address client status updates provided by Friendly Visitors, Friendly Drivers, and others.

Actions

#	Description	Responsible	Due
1	Assess social hour for widows/ widowers.	COA Staff, Volunteer	FY '18

Objective I: The COA will offer programs to support the physical well-being of Carlisle seniors.

In support of Objective I, the Director and staff will perform the following operational activities:

1. Independently or collaboratively sponsor programs such as exercise activities, abuse awareness and prevention, health clinics, and topical medical awareness sessions.
2. Provide access to supermarkets on a regularly scheduled basis.

Actions

#	Description	Responsible	Due
1	Define actions based on survey results	COA Staff, Board	FY '18
2	Implement defined actions	COA Staff, Board	FY '19-'22

Goal IV - Security: Promoting safety and stability for Carlisle seniors

Objective A: The COA will encourage seniors to improve safety in their homes and community.

In support of Objective A, the Director and staff will perform the following operational activities:

1. Encourage frail seniors living alone to enroll in the RUOK program (an opt-in/signup program).
2. Manage Friendly Visitor and Friendly Caller programs to support the sense of safety and security.
3. Contact target audiences in case of any emergency.

Actions

#	Description	Responsible	Due
1	Promote RUOK and other safety programs on website	Volunteer, COA Staff	FY '18

Objective B: The COA will promote, advocate, and administer federal/state/grant programs in support of target audience financial stability.

In support of Objective B, the Director and staff will perform the following operational activities:

1. Research additional funding sources.
2. Administer fuel assistance to any qualified town resident in need.
3. Promote health insurance/benefits counseling (SHINE) to Carlisle seniors.
4. Coordinate access to and/or delivery of donated fresh produce from Gaining Ground, Carlisle Farmers Market, and other options as they are identified.
5. Administer Carlisle Senior Tax Worker Program and advocate for expansion as needed.

Actions

#	Description	Responsible	Due
1	Assess opportunities to expand senior tax relief (i.e., Sudbury Tax Relief Model); promote available options such as current in-town age-related/qualified tax exemptions	COA Staff, COA Board, Senior Tax Advisory Committee	FY '19
2	Work with town government to assess the property tax deferred program for seniors	COA Staff, COA Board, Senior Tax Advisory Committee	FY '19

Objective C: The COA will advocate for appropriate senior housing alternatives in town.

In support of Objective C, the Director and staff will perform the following operational activities:

1. Attend meetings to investigate and support housing alternatives.
2. Partner with Carlisle Housing Authority to advocate for future projects as appropriate.
3. Inform and encourage seniors to discuss options with Housing Authority.

Actions

#	Description	Responsible	Due

Section 4: Accomplishments

FY '15 (July 2014-June 2015)

- Approved Long Range Plan under implementation
- New Logo and Tag Line Approved
- Email Communications Revamped
- Subsidies for Nashoba and Minuteman lunches introduced
- Space Committee Established
- Generations United recognize Carlisle as the Best Intergenerational Community

FY '16 (July 2015-June 2016)

- 1st Intergenerational Road Race held
- Space Committee pre-work for Feasibility Study Warrant Article
- New handicapped-accessible van obtained via a MassDOT Grant through the LRTA
- Introduced Pilot Transportation program with Flow Transportation
- Transportation voucher program launched

FY '17 (July 2016-June 2017)

- Co-sponsored, with Board of Health and Library, the Caring for Carlisle Community Health Needs Assessment
- Piloted a support group for single seniors
- Space Committee completed pre-work for Feasibility Study Warrant Article
- Feasibility Study warrant article brought to Town Meeting (did not pass)
- Transportation Pilot continues
- New Web Site content defined
- 2nd Intergenerational Road Race held
- Advocate for Accessory Apartment Warrant Article (passed)
- Three new Associate Board Members recruited

FY'18 (July 2017-June 2018)

- Successful launch of a support group for single seniors
- Piloted a Meditation group
- One new Associate Board member
- 3rd Intergenerational Road Race held
- Caring for Carlisle survey analyzed for implementation activities starting in FY '19
- Successfully supported CHNA grant effort; awarded CHNA grant money to use toward Community/Senior Center conceptual study and a Transportation initiative
- Began a search for alternate transportation providers including the CrossTown Connect Taxi Initiative

Other:

- Successfully advocated for a change in the title and funding of what is now the COA Outreach & Program Assistant position; achieved funding for six additional hours
- Successful receipt of a \$12,500 grant from the CC Community Chest
- Worked with the Town Treasurer to restructure the way the LRTA grant is accounted for in relation to the COA Budget
- Launched a Carlisle COA Alzheimer's Walk fundraising team called "Carlisle Fights Alzheimer's"

Glossary

Access: ability to find information; the capability to freely move about one's living unit and local environment.

ADA: Americans with Disabilities Act as defined by federal law.

Adjusted population: the gross population, removing census respondents who did not provide their ages

Aging in place: a concept that expresses a maturing person's goal of staying in his/her home and living independently as long as possible. This may involve in-home aids and adaptations.

Attached residences: apartments and condominiums, typically with a smaller footprint, potentially with first floor master suite and fee-based maintenance through an association. Enables aging in place; typical of livable communities.

Baby Boomer: demographic segment of over 70 million people born between 1946 and 1964.

Caregivers: adult family members, friends, neighbors, paid aides, or other interested parties who monitor and/or care for those in need.

Carlisle Town Transportation Task Force: an ad-hoc group entrusted with the development of policy and procedures for the FY15 mobility-challenged adult pilot transportation program.

CHA: Community Health Assessment

Community Health Network Area: Carlisle is a member of CHNA 15, which is one of 27 Community Health Network Areas (CHNAs) in Massachusetts created by the Massachusetts Department of Public Health in 1992. The CHNAs, an initiative to improve health through local collaborations, are part of a statewide effort to develop, implement, and integrate community projects that effectively utilize community resources to create healthier communities.

COA: Council On Aging, a town department.

COA Board: a nine member volunteer board that supports the work of the COA Department and is committed to compassion, outreach, and advocacy for age 60+ residents.

Cognitive: related to thinking, reasoning, and learning.

Cohort: a population sector of people sharing common characteristics.

Communication vehicles: various media such as print, TV, and online that carry an organization's messages and relevant, timely information to its target audiences; inbound/outbound telephone conversations.

Congregate meals: monthly breakfasts and luncheons for the age 60+ community.

Connection: positive interaction and communication with others in person, online, and through other media; the receipt of timely information regarding COA programs and services as well as special alerts.

Cross Town Connect: a regional consortium that provides shared van and driver scheduling and transportation services; may widen the COA's current geographical transportation radius and expand service hours for member towns. Offers member towns the potential for economies-of-scale and increased service levels. Carlisle will assess potential membership.

Day trip: half- or full-day scheduled, fee-based events that provide transportation out of Carlisle for visits to local museums, theaters, historical sites, cultural events, shopping venues, etc.

Dedicated space: physical space devoted solely to a specific purpose; ideally this includes utilization, policy definition and scheduling control for the management of a physical location for programming and/or offices.

Emerging Baby Boomer: residents age 50-59, future recipients of services and programs, future source of volunteers.

Focus Area: an initiative to which attention and consistent effort is applied that results in significant progress. A focus area is not necessarily completed in one fiscal year.

Friends of the Carlisle Council on Aging: a volunteer community group whose mission is to raise funds to augment the programs and services of the Carlisle COA Department, differentiated from the COA Board.

Friends of the Carlisle Public Library: a volunteer community group whose mission is to raise funds to augment and manage programs and services of the local library.

Friendly Caller: volunteer who contacts adults to verify their well-being as needed.

Friendly Driver: a volunteer, utilizing his or her own vehicle to provide transportation services or deliver Meals on Wheels.

Friendly Visitor: a volunteer who visits, regularly or as available, seniors in need to alleviate isolation and check on their status.

Gross Population: all citizens counted in the annual town census.

Intergenerational: activities that link and engage age 60+ adults with younger age groups, such as high school or grade school students.

Local Emergency Plan Committee: serves Carlisle during natural disasters, utility emergencies and the like. The COA actively participates.

Livable Community: a community that welcomes and supports the needs of age 60+ residents by offering connection; emotional, cognitive, and physical well-being programs and services; mobility and access; and a sense of security and stability.

Lowell Regional Transit Authority (LRTA): provides driver training for their vans, van maintenance, and access to purchasing discounted vans. Carlisle, as a member town, receives funding from the LRTA.

Massachusetts Executive Office of Elder Affairs: a state agency which supports adults age 60+ and assists local COAs.

Meals on Wheels (MOW): fresh and frozen meals provided by Minuteman Senior Services and delivered by volunteer MOW Drivers.

Minuteman Senior Services: a regional state-funded social service agency that shares information, offers programs, and provides support to age 60+ residents in local communities. A COA Board member acts as liaison to this organization.

Mobility: ability to move safely and easily around one's environment.

Mobility-challenged persons: residents who experience movement restrictions outside the home and require transportation services; excludes public school persons served by mandatory transportation services.

MSC: *My Senior Center* software program, used by the Carlisle COA, tracks service and program utilization to help set benchmarks and measure progress.

Outreach: proactive efforts to engage and involve age 60+ adults by providing referrals to services and programs; responsive in a timely and confidential way to individual-initiated requests for services and help.

Regional Transportation Coordinating Council: a new local area group dedicated to addressing transportation gaps in local towns.

RUOK: Are You Okay?, a safety and peace of mind program that residents can opt into that results in an automated regularly scheduled phone call; offered by the Police Department. Officers follow up on unanswered calls.

Security and stability: personal safety and sense of well-being; financial means adequate to meet basic expenses; access to adequate healthcare.

Seniors: age 60+ adults, as defined by the Massachusetts Executive Office of Elder Affairs.

Senior Tax Worker Program: a program in which income-based eligible age 60+ residents work assigned hours for town departments and receive payment to help reduce property taxes.

SHINE (Serving the Health Insurance Needs of Everyone) counselor: a trained volunteer, certified by the Massachusetts Executive Office of Elder Affairs in many areas of health insurance, including Medicare Parts A, B, and D; Medigap insurance; Medicare HMOs; prescription drug

programs; Medicaid; Medicare assistance programs; and other programs for people with limited resources.

State Formula Grant: administered by the Massachusetts Executive Office of Elder Affairs, funds are based on recent census data and calculated annually at a state approved rate per senior.

Strategic Plan: a vision for the future that sets priorities and contains an action plan; a living document.

Sudbury Tax Relief Model: based on resident's age and/or residency longevity, real estate taxes are reduced.

Appendices

Exhibit I: Taxes and Housing Options Affect Decision to Age in Place
Exhibit II a: Town Survey Shows Need for Varied Housing Options
Exhibit II b: Limited Housing Options Challenge Aging in Place
Exhibit III: Residents See Need for Varied Transportation Services
Exhibit IV a: Trend – Age 60+ Cohort Grows Despite Total Population Decline
Exhibit IV b: Trend – The COA Must Attract Maturing Baby Boomers
Exhibit V: Funding Sources Augment COA Reach and Impact
Exhibit VI: Internal and External Assessment Guides
Exhibit VII: FY '18 Strategic Plan Actions and Implementations

Exhibit I: Taxes and Housing Options Affect Decision to Age in Place

Factor	Would Influence My Decision (% of Respondents)
Taxes and cost of living	81
Cost and bother of maintaining residence	71
Availability of other housing options	52

Source: 2009 Town Survey Question #13

Exhibit II a: Town Survey Shows Need for Varied Housing Options

Housing Option	Maybe/Definitely Need (combined) (% of Respondents)
Small, private residences	53.3
Condo/apartments	52.7
Affordable housing units	33.8
Multi-family housing	20
Group or congregate housing	23
Housing with on-site assistance	44.5

Source: 2009 Town Survey Question #40

Exhibit II b: Limited Housing Options Challenge Aging in Place

Housing Options	# of Units	# Income Qualified Units	Age Restriction?
Village Court*	18	18	Yes (18)
Malcolm Meadows*	12	0	Yes (12)
Rocky Point*	8	2	No (0)
Benfield Farms*	26	26	Yes (26)
Permitted Accessory Apartments**	15	0	No (0)
Totals	79	46	56 units age restricted

* Source: Town of Carlisle Housing Production Plan, 2010

** Source: Town of Carlisle Planning Board Office, May, 2014

Exhibit III: Residents See Need for Varied Transportation Services

Type of Service	Some Need/Great Need (Combined) (% of Respondents)
Curb service (no assistance)	59.9
On demand	44.7
Fixed route	42.7
Special events	34.4

Source: 2009 Town Survey Question #42

Exhibit IV a: Trend - Age 60+

	2011	2014	Delta	% Change	2015	Delta	% Change	2016	Delta	% Change
Total Population	5601	5380	(221)	(3.90)	5336	(44)	(0.82)	5123	(213)	(3.99)
Age 60+	1207	1357	150	12.43	1317	(40)	(2.95)	1409	92	4.88

In 2011, 21.54% of the population were 60+

In 2014, 25.22% of the population were 60+

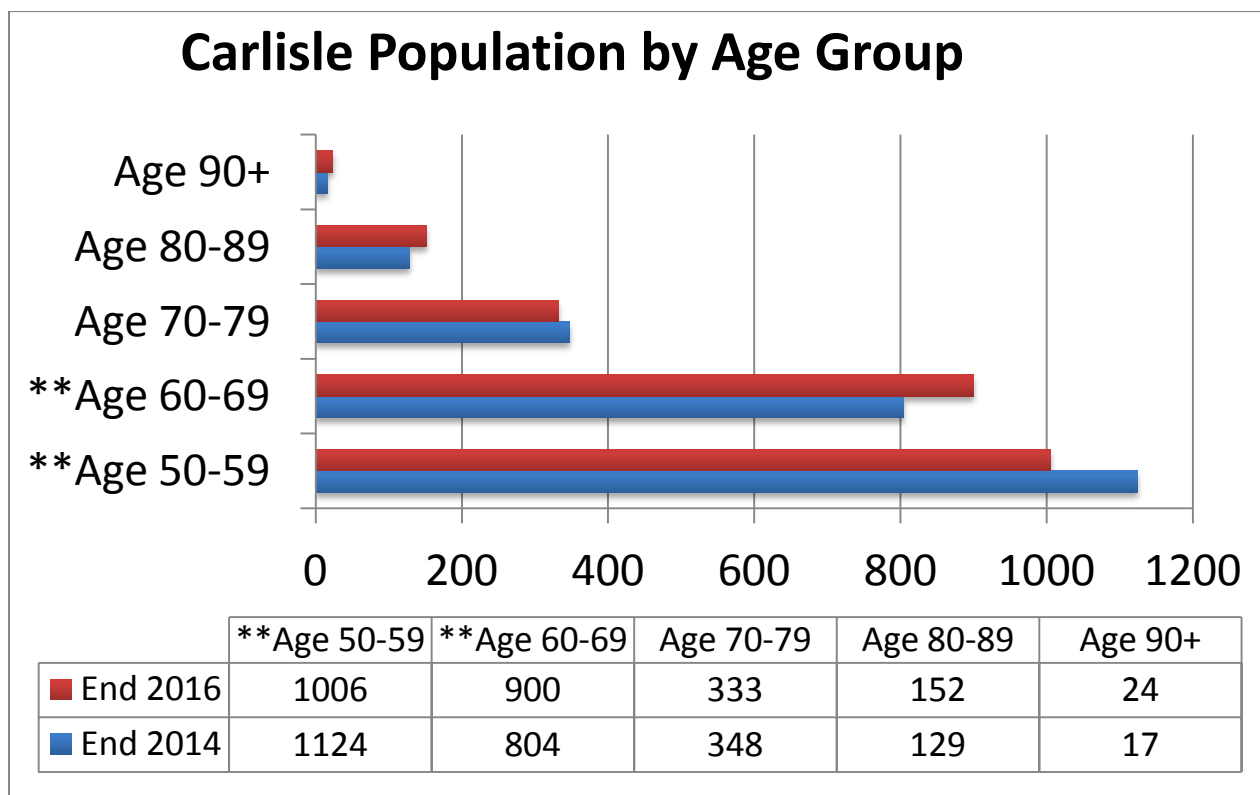
In 2015, 24.68% of the population were 60+

In 2016, 27.50% of the population were 60+, not including 112 whose ages are not known

Source: Town Clerk, February, 2014

Town Clerk, February, 2016

Exhibit IV b: Trend – The COA Must Attract Maturing Baby Boomers

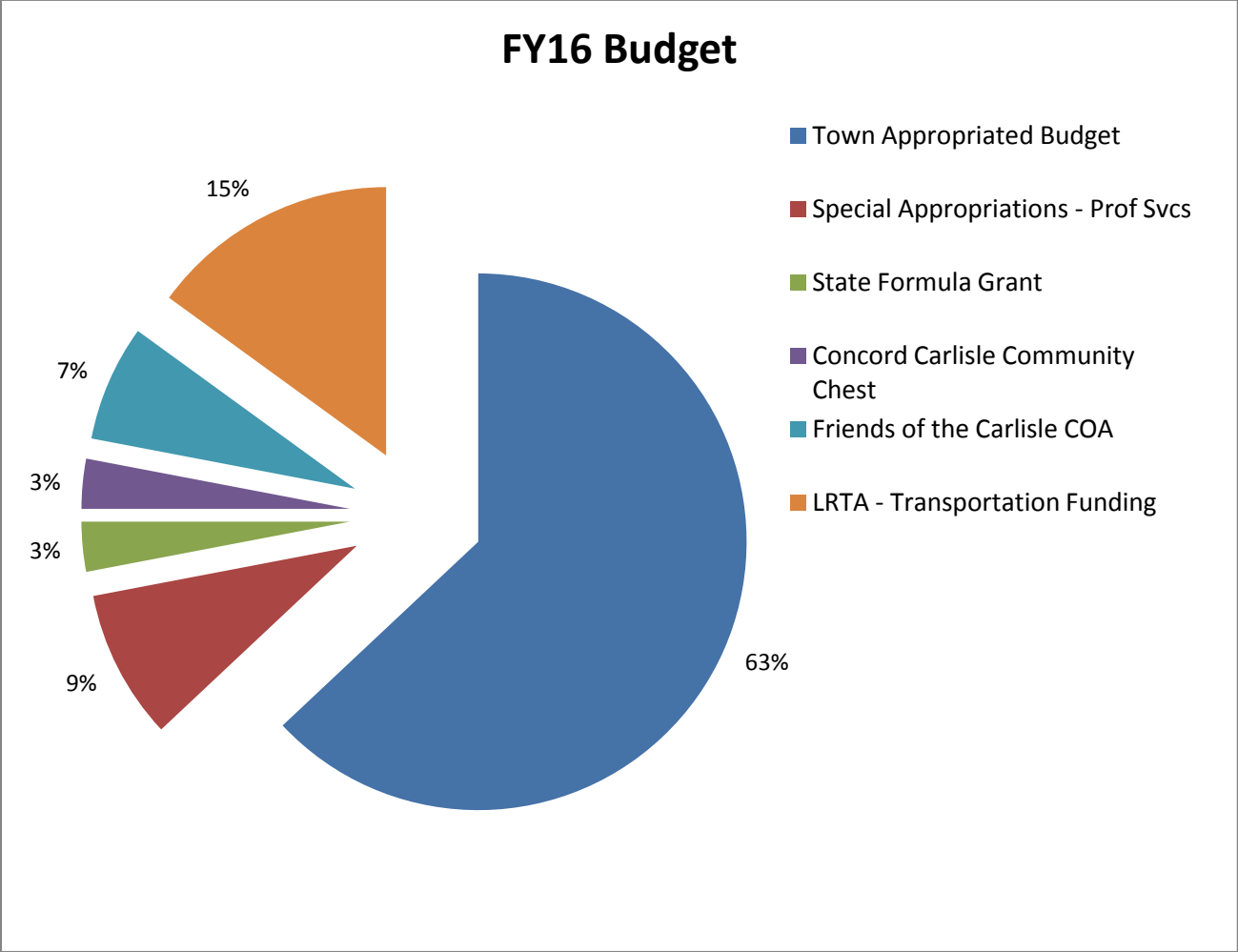


** The scheduling and diversity of COA offerings must attract this population segment.

Source: Town Clerk, February, 2014

December, 2016

Exhibit V: Funding Sources Augment COA Reach and Impact



Source: FY16 COA Budget

Exhibit VI: Internal and External Assessment Guides

Internal Factors

Strengths
1. Experienced full- and part-time staff
2. Wide breadth of programs: social, cultural, wellness (emotional) and fitness
3. Intergenerational programs
4. Able to serve current transportation requests at 99 – 100% level
5. Broad base of volunteers
6. Promotion of support resources to frail/isolated seniors
7. Strong relationships and communication with Town Hall departments
8. Supportive COA Board and Friends of the COA
9. Strong service utilization, double that of towns nationally
10. Multi-channel communication(s) to target audience
11. Provision for financial assistance (food, fuel and tax relief)
12. Utilization of multiple program venues
13. Responsible fiscal management of town funds
Weaknesses
1. Low awareness of COA mission, services, and programs
2. Limited hours and days for transportation services
3. Lack of dedicated space impacts consistent/efficient program scheduling and hinders drop-in programs
4. Some programs with low attendance/no policy for minimal attendance
5. Limited transportation services to mobility-challenged adults
6. Tax relief advocacy (not varied or enough)

External Factors

Opportunities
1. Friends of the COA funding for fiscal needs
2. Analysis of data to improve services/programs and gauge effectiveness
3. Influence the use of existing and potential community space at Bedford Road, Benfield Farms, Carlisle Public Schools, etc.
4. Expanded Lowell Regional Transit Authority budget
5. BOS request to expand transportation services via FY15 pilot program
6. Assessment of the needs of younger seniors (age 60-69) and emerging audience (age 50-59); widen COA reach
7. Cross-Town Connect may offer the ability to gain efficiencies for the scheduling/scale of transportation services
Threats
1. Increase in senior population, as a percentage of the town, who may need more support
2. Reduction in funding (local, regional, state, private, grants)
3. Some venues could be at risk for program scheduling
4. Inadequate office space for staff and storage
5. Growth and diversity of senior population may need more/different support
6. Attrition of talent and good will of volunteers
7. Rising property taxes
8. Change in town government structure

Exhibit VII: FY '18 Strategic Plan Actions and Implementations

FY '18 COA Strategic Plan (All dates are Fiscal Year)

Goal	Objective	#	Description	Responsible	Due	Status	Notes
Trust	A	1	Long Range Plan to reflect FY17 – FY21	LRP Subcommittee, COA Staff	June FY '17 then annual updates	May '18 - Met to update for FY '19 Jun '18 - Set to Board for review; LRP update accepted	May '17 - Report progress to COA Board Jun '17 - LRP update accepted DONE Dec '18 - 6 month update Q3 '18 - Update for FY '19 Q4 '18 - Get Board OK for '19 DONE
Trust	B						
Independence	A	1	Analyze transportation data and recommend modifications as needed to Board	COA Staff, Transportation Coordinator	Data reported monthly; analysis at least annually starting in FY '18		Dec '18 - David - No major modifications currently envisioned unless the town were to make the determination to join CrossTown Connect either as a member or as a partner in a new taxi transportation initiative (see comments for obj B 1). Jun '18 - Data reported each month as required; DONE
Ind	B	1	Analyze results and feedback from transportation pilot program to determine next steps.	COA Staff, Transportation Task Force	FY '19	Dec '18 - For the time being, no change in the pilot program. Jun '18 - Supports a small group of people; voucher sales strong among those who use	Dec '18 - David/Abha - The next steps will be determined once the larger town transportation puzzle is solved, which will take more time to work on. Jun '18 - Nothing new to report to the Transportation Task Force or anyone else. It helps a relatively small group of people with access to transportation that the COA cannot usually provide either in scope of distance or in hours of service. The numbers have dipped slightly, but go up and down. Voucher ticket sales have been strong among those who use the service.
Ind	C	1	Assess the degree of success of the area roll-out of the Cross Town Connect consortium and evaluate the potential benefits, financial impact, and tradeoffs for Carlisle to join and report to Town Administrator and Board of Selectmen	COA Staff, Transportation Committee	FY '18 (extended to FY '19)	Oct '18 - Presented information about CTC to the Selectmen Nov '18 - Attendance at CTC meeting; discussion of a taxi program; completion of Carlisle profile Dec '18 - meeting with Transportation Committee re getting more info from CTC Feb '18 - Taxi initiative Pilot thru Cross Town Connect supported by Selectmen/Planning Board; \$5K requested from CHNA Jun '18 - Committee formed as an outcome of CHNA grant	Dec '18 - David - Progress has been made in this area and we've met the goal as much as possible in FY18. Joining CTC would be a Town decision, not just the COA. Jan '18 - Possibility of CHNA \$ for CTC admission fee. Jun '18 - Outcome awaits committee assessment
Ind	C	2	Re-assess transportation policy	COA Staff, Transportation Committee	Annually starting in FY '18		Dec '18 - COA staff review Jun '18 - Staff review of current transportation policy was started and then stopped as further transportation options, i.e. a regional taxi/mobility on demand option presented itself and have been pursued with an update expected in the fall of 2018. Staff review expected to resume at that point. DONE
Connectivity	A	1	Investigate ways to maximize participation as facilities & circumstances allow	Program Committee, COA Staff	Annually starting in FY '18		Mar '18 - piloted meditation group successfully DONE
Conn	B	1	Recruit one or more new COA Associate Board member(s)	Nominating committee	Annually		FY '17 - 3 New Associate Board Members recruited DONE May '18 - 1 new Associate Board Member recruited DONE
Conn	C	1	Request for funding for feasibility study of a community/senior center at Town Meeting	COA Staff, COA Board Chair, Space Committee	FY '17	DONE	FY '17 - Not passed DONE
Conn	C	1	Pursue funding for Feasibility Study	COA Staff, COA Board Chair, Space Committee	FY '18	DONE	Dec '18 - NEW Nov '18 - As a result of C4C Survey, consensus reached with Board of Health to request CHNA implementation \$; no final resolution till Spring. Jan '18 - Warrant Article submitted for Town Meeting; met with selectmen - generally supportive Feb '18 - CHNA request for \$12K submitted May '18 - CHNA request partially granted DONE
Conn	C	2	Define the parameters and create a gift account to receive private donations toward a capital fund for a	COA Staff	FY '18 (extended to FY '19)		Dec '18 - David commented not to move out to FY '19 just yet. Jun '18 - moved to FY '19
Conn	D	1	Assess participation rates in various program categories to ensure optimal services are provided.	Program Committee, Program Manager, COA Board	Data reporting monthly; assessment at least annually starting in FY '18		Dec '18 - Access to My Senior Center granted to Maxine; data analysis TBD; events are up to date May '18 - Data Analysis complete with recommendation to update categories; difficulty with categories make analysis less than useful; category update will occur over the summer DONE
Conn	E	1	Define a new website in conjunction with the upgrade of the town's web presence	Director, Volunteer	FY '17 (extended to FY '18)	DONE	FY '17 - Site content defined; implementation based on town priorities May '18 - Beta out for review Jun '18 - There has been a shift from departmental control of the respective new department sites to a more centralized control of updates. That said, a good amount of updates have occurred on the new site in the past several weeks, so maybe the latest prediction of a late June or early July 'live' date will come to pass. It's been suggested that we look to fold the www.carlisletransportation.com site into the Town COA site. Website live.
Conn	F	1	Define and promote at least one major intergenerational event e.g. Road Race	Board, COA Staff	Annually	May '18 - Race Day set for FY '19	FY '17 - Intergenerational Road Race held 11/11/16 (201 participants \$1502) DONE FY '18 - Intergenerational Road Race held 11/11/17 (112 participants -\$1390) DONE
Conn	G	1	Assess web-based service that provides the capability for self-serve program payment and registration	COA Staff, Town Treasurer	FY '19	May '18 - Discussions with "My Senior Center" and town Finance Director; hopeful for FY '19 implementation Jun '18 - David visited My Senior Center's two identified beta sites that are using the payment system currently, the Wellesley and Barnstable COAs respectively. There's no question that the additional payment flexibility has been popular with senior clients that have used it. But each of the COAs has also had to work to deal with kinks involving their respective COA staff and Town Treasurer operations. This will have to be done here in Carlisle as well.	

FY '18 COA Strategic Plan (All dates are Fiscal Year)

Goal	Objective #	Description	Responsible	Due	Status	Notes
Conn	H 1	Pilot a social hour for widows/ widowers.	COA Staff, Volunteer	FY '17	FY '17 - pilot begun in April DONE	
Conn	H 2	Assess social hour for widows/ widowers.	COA Staff, Volunteer	FY '18	DONE	July '18 - participation was 25 at the first session, both men & women; participation was 15 the last, only women Nov '18 - Angela reported the following: Apr=18, May=13, Jun=12, Sep=15, Oct=11, Nov=10, Dec=12; Jan=13, Feb=13, Mar=11; Apr=14; May=7; June=
Conn	I 1	Team with Library and Board of Health to create a CHA sponsored 'Caring for Carlisle' survey	Director, Board, Volunteer	FY '17	FY '17 - C4C Survey defined and executed DONE	
Conn	I 2	Define actions based on survey results	COA Staff, Board	FY '18 (extended to FY '19)	May '18 - Strategic Plan Committee reviewed survey result and process of defining actions has begun	Sep '18 - Final report in 2nd draft Nov '18 - Final Draft released with recommendations; review meeting held; CHNA queried on use of implementation \$ for Feasibility Study for Community Center - CHNA OK. Dec '18 - C4C Community Health Needs Assessment recommended a broader transportation service in Carlisle. Town issue, not COA.
Conn	I 3	Implement defined actions	COA Staff, Board	FY '19-'22		
Security	A 1	Promote RUOK and other safety programs on website	Volunteer, COA Staff	FY '18	DONE	Nov '18 - See Conn E1 - New website not operational until 3/18 so current comm vehicles being used Nov '18 - Maxine requested info from Angela Dec '18 - Web now up by end of fiscal year May '18 - despite monthly publicity; no change Jun '18 - 2 most of the year; much publicity
Sec	B 1	Assess opportunities to expand senior tax relief (i.e., Sudbury Tax Relief Model); promote available options such as current in-town age-related/qualified tax exemptions	COA Staff, COA Board, Senior Tax Advisory Committee	FY '19	July '18 - Reported on passage of MA Bill S2124 in the Senate now moving to the House Aug '18 - Reported on consolidated bill S2125, passed in Senate, now in House Mar '18 - Housing Trust looking at tax-related programs for seniors; David invited to participate Jun '18 - David participates in a panel for the Governor's Council	June '18 - Working with town government to assess the property tax deferred program for seniors. COA Director met with three of the Selectmen at a Housing Trust Meeting to discuss the Property Tax Deferral program. It met with resistance that was not unkind, but it unfortunately seems like a stalled issue for reasons that are easier to articulate in person. It is hopefully being looked at also at the State level, so maybe something can be done in FY '19.
Sec	C 1	Represent COA in meetings advocating for accessory apartments in Town	Town Advisory Group subcommittee	FY '17	FY '17 - Article passed in Town Meeting DONE	

COA Road Race Event – By the Numbers (thanks to Verna for supplying):

Year	Online Reg	Day Reg	Total	Weather	Day	Rev	Exp	Diff	Grants	Net Revenue or (Cost)
2015	139	40	179	Cool & Rainy (off and on)	Wednesday	2,290	3,197	(907)	1,800	893
2016	119	82	201	Partly Sunny & Mild	Friday	3,782	3,780	2.00	1,500	1,502
2017	82	32	114	Very Cold – Sunny	Saturday	2,695	4,085	(\$1,390)	0	(\$1,390)*

*2017 Includes: \$359 police detail, \$61 for coffee & bananas, \$189 for ads, \$165 for signs (est.), also \$311 (approx.) for Marx Running & Fitness Race Management, and \$150 to rent Union Hall